

BOUNDARY MINING GROUP OUTSIDE SALES SOP

CUSTOMER COMMUNICATION STANDARDS SOP

INTRODUCTION

Tools Used: HubSpot CRM, Microsoft Outlook, Phone Calls

Purpose

The purpose of this SOP is to establish consistent customer communication standards across Boundary Mining Group and ensure all customer interactions are professional, timely, accurate, and properly documented within HubSpot.

Scope

This SOP applies to all Boundary Mining Group employees who communicate with customers, vendors, dealers, or external stakeholders using HubSpot, including but not limited to Outside Sales.



DATE
05/20/2026

APPLIES TO
Sales Team

Detailed Procedure – Customer Communication Standards Sop

1. COMMUNICATION EXPECTATIONS

Professional tone

Timely responses

Accurate information

Clear commitments

2. EMAIL STANDARDS

Subject lines

- Keep subject lines concise and specific
- Include the customer's name, equipment, RFQ number, or topic when applicable
- Avoid vague subjects such as "Hello" or "Update"
- Use consistent formatting to improve searchability and tracking

Response timelines

- Acknowledge customer inquiries within the same business day whenever possible, otherwise 1 business day.
- All customer emails should receive a response within 3 business days
- If a full answer is not yet available, send an acknowledgment confirming the request is being reviewed

Signature standards

- All customer facing emails must include an approved company email signature.

3. LOGGING COMMUNICATIONS

Accurate communication logging in HubSpot ensures visibility across teams, improves customer support continuity, and creates a reliable record of customer interactions.

All significant customer communications should be logged in HubSpot under the appropriate Company, Contact, and/or Deal.

Calls - CRM → Company or Contact Record → Activities → Log Call

Meetings - CRM → Company or Contact Record → Activities → Log Meeting

Complaints & Feedback - CRM → Company or Ticket Record → Create Note

4. CUSTOMER RESPONSE TIME EXPECTATIONS

RFQs acknowledged same business day whenever possible, otherwise 1 business day.

Customer inquiries responded within 3 business days

5. DOCUMENTATION STANDARDS

Avoid vague notes

Use factual summaries

Record commitments and due dates